

Wealth with Purpose

Planning, ascending, and enjoying the rewards, Alterra Advisors will be here to guide you every step of the way.

Let the Journey Begin

Getting to Know You

Every journey begins with a vision — yours. This starts with a friendly conversation. We want to hear about your family, your hopes and your dreams. It's important we find personal connections. Because, sound financial advice

depends on the quality of the relationship. At Alterra Advisors, we see our clients as partners.



Taking the First Step



Creating Your Plan



Viewing the Horizon

Are We a Fit?

Let's start a conversation. We're not a match for everyone. But, if you're looking for a collaborative guide in your financial life, Alterra Advisors could be a fit for you.

[Start Your Journey](#)



Success Stories

John and Cindy have paddled Lake Chelan together for 35 summers. They have three successful children and are raising a pup they call “a Jack Russell terrorist.” John was referred to Alterra Advisors by a son who simply said, “You can trust these guys.”

Originally, John’s son, one of 11 partners in a downtown law firm, had come to Alterra with a few complex challenges. We earned his loyalty after guiding them to strategies that reward their key executives and simultaneously enable the retirement of three founding partners. His business thrived and, as a result, he was anxious to refer his parents when they neared retirement.

John and Cindy’s goal was more focused – create a legacy for their children and charities. In John’s words: “Grow and preserve our wealth, keep me informed, and talk to me face-to-face.” That’s just what we do. Cindy now says we’re like part of the family.

+ Business Planning + Retirement Planning
+ Wealth Management +

Contact Us

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